

MUG Meeting Notes  
Thursday, August 15

Michele Mullings-Shand facilitated the meeting.

1. Future Training needs - Robin Gurien. The Training Team will be developing new classes and revising the original training classes. They would like input from users regarding special topics we would like to see covered in 1½ hour classes or suggestions of things to add or delete from classes that we've already taken. They are also seeking people willing to serve on focus groups. Input can be sent to Robin by e-mail, phone or campus mail. Robin will also come to the next meeting to discuss training needs. A message will be sent to users regarding upcoming training sessions for students to be held the first two weeks of September. Three classes will be held on requisitions and three classes on forms. While these classes are primarily for students, anyone can attend.
2. Quarterly releases.
  - Object code changes – Bruce Rieks. Effective September 1, the capital asset object code, 04025, used for equipment, will be changed to 71250, capitalized equipment expense. Users should use the new code starting September 1. The Controller's Office will do the clean up work to change the object code on equipment purchased prior to September 1. Individual items priced over \$2,000 fall into the capitalized equipment expense. Items under \$2,000 should use the 63110 object code. Object code 64100 is new and will be used for mail service processing charges. This includes sorting and stuffing and is an expense we did not previously need to pay. Additionally, the postage charges have been delayed for July and will be entered in August. A recommendation was made for users to print the object codes report at the beginning of each year to use for reference. It is available in the online reports.
  - Launch page option – Karen Paulsen. After the demonstration at the last meeting, the feedback indicated the users were interested in the new launch page, but not ready to switch to it. In response to that feedback, the option will be made available for users with the September 1 quarterly release. After choosing a report from the main report page, the user will be able to choose to run the report by fund, specific account or the new range of options.
  - Report listing – The consensus of the users attending the meeting was to list the reports in alphabetical order within categories (Financial, Human Resources, References).
  - Password reuse rule – Eunice Dell. Due to security rules, users will need to change their passwords every 90 days. The change is that a password cannot be reused within one year. The rules are listed, but the hope is to get the rules posted on the page used to change a password.
  - Revenue over/under expense – Karen Paulsen. The revenue over/under expense appears in the Statement of Account – Financial Summary Report. It is calculated at the fund level. The number does not include encumbrances and is only for the current fiscal year – does not reflect any carryover balance.
  - Accounts Approved for Viewing will list the accounts available to an individual user. It will be in an exportable file so the data can be manipulated in Excel.
3. Questions/Answers
  - In future meetings, discussions could be held to explore features of individual reports. For example, a suggestion was made to have the ability to go from one report to another without re-entering the account number – would need a PAR
  - Possible PAR to add the drill down capacity to the Statement of Account – Financial Summary.

- Personnel Expenditures – A PAR is in the works to add employee names to the lines in the report. Eunice is trying to expedite this PAR since neither an on-line or printed budget will be available this year.
- Testing. Users are needed for two kinds of testing.
  - 1) to test reports nearly ready to be released
  - 2) to test reports during development.Ideally, all of the tests could be run from the users own desk and the test group would contain MAC users as well as PC users.
- A new Cash Advance Form is available and should be used instead of the Interdepartmental Requisition for all cash advances.
- If a vendor cannot be located in “Supplier Inquiry,” it may be listed under a parent company and could be found by using the “Alternate Name” field (e.g. Brown Bottle is listed under Landau).